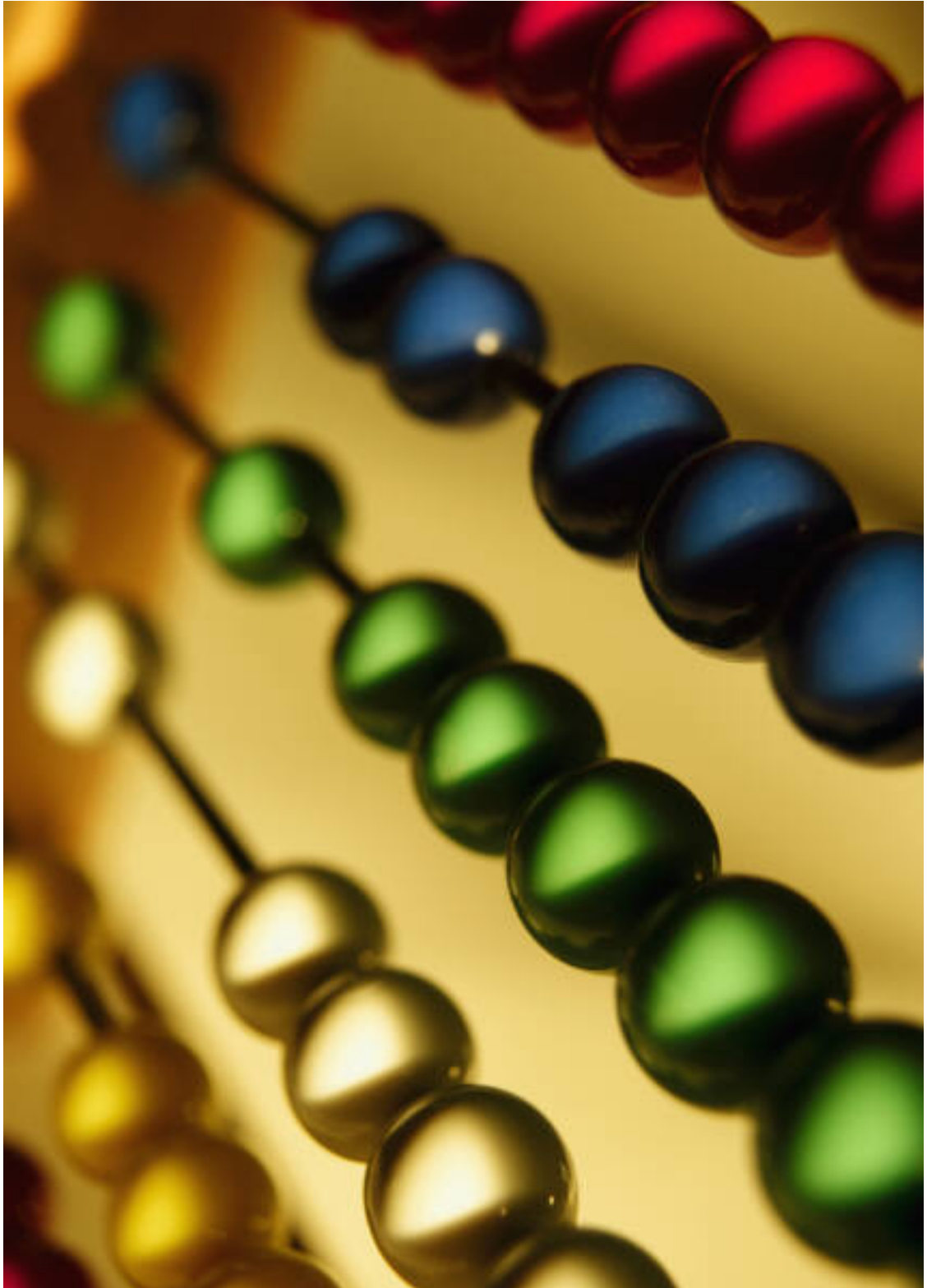


Bi-Weekly Report as of August 6, 2004



FSA Performance Plan – FY2004

SUMMARY

COMPLETED PROJECTS

- With the award of the contract for the design of an Integrated Partner Management Solution, all milestones for Project 63 (*Improve School Partner Oversight*) are complete and the project is accomplished.

GREEN LIGHT

- Total non-consolidation recoveries have now reached \$1.361 billion, an increase of 24 percent from the same period, in fiscal year 2003. This contributes toward the success of Project 13 (*Borrower services – Enhance program monitoring and oversight*).

YELLOW LIGHT

- Although reconciliations for July are being performed well under the 30-day goal, there is continued concern regarding the Reconciliation Reengineering Projects contract vehicle for Project 29 (*Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements*). A request to move the reengineering contract to Oracle 11i has been pending with Contracts since early July. Resolution of this matter is important to comply with future reporting requirements.
- Project 68 (*Continue Learning Coupon Program*), Project 71 (*Re-engineer EDEExpress*) and Project 74 (*Implement Leadership Excellence Development Training*) continue to be reported as Yellow.

RED LIGHT
















































- Project 52 (*Restructure integration leadership support to transition the majority of responsibility to FSA staff*) has gone from Green to Red because the establishment of an integration team is necessary if FSA is to assume integration support functions currently performed by the integration contractor. This new team has been proposed in the ASEDS reorganization package which has yet to be approved. There is insufficient time to fully accomplish this action item before the end of the fiscal year.

CANCELLED

- With the approval of the IPC, Project 51 (*Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle - SLC)*) is cancelled for FY 2004. When this Project was developed, it was thought that the responsibility for the SLC methodology would reside within FSA. Subsequently, this became a part of the One ED initiative under the jurisdiction of the Department's OCIO.














ACTION PLAN STATUS AT A GLANCE

as of August 6, 2004

FSA No.	Indicator	Status
1	IMPLEMENT STUDENT AID AWARENESS INITIATIVES	
1.1	Leverage partnership activities to disseminate FSA information	
1.2	Publish accurate and timely information that meets the needs of our audience	
1.3	Disseminate information directly to target audience	
1.4	Respond accurately and timely to requests	
1.5	Reach customers through Student Aid on the Web	
2	IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER	
2.1	Monitor customer feedback to improve services	
3	CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)	
3.1	Implement application	
4	PROVIDE EDEXpress APPLICATION MODULES	
4.1	Release application module	
4.2	Release Common Origination and Disbursement module	
5	PROCESS PELL & DIRECT LOAN TRANSACTIONS THROUGH COD	
5.1	Issue COD software release	
5.2	Issue COD SOO	
6	ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES	
6.1	Prepare list of schools that do not submit FISAP; call schools to ensure compliance prior to tentative award notification	
6.2	Notify schools of tentative awards	
6.3	Call remaining schools that have not submitted FISAPs or that need to correct FISAPs prior to required closure of database	
6.4	Issue final awards to schools	
6.5	Issue FISAP software release	
7	UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)	
7.1	Complete Oracle 9i Upgrade	
7.2	Upgrade Windows NT server that houses the E-App	
8	EXPAND eZAUDIT INITIATIVE	
8.1	Commence contract start-up	
8.2	Complete first full cycle of processing (all school types)	
8.3	Improve audit review component of compliance activities by increasing the e-submission rate to 95%	
9	ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP & DEL SERV)	
9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year	
9.2	Continue to measure school monitoring to assess overall compliance trends	
9.3	Conduct School Relations initiatives	
9.4	Conduct Experimental Sites initiative	
9.5	Administer the Quality Assurance program	
9.6	Conduct vulnerability assessment	
10	PRODUCE SCHOOL PUBLICATIONS AND MATERIALS	
10.1	Annually update and disseminate the Federal Student Aid Handbook	
10.2	Update and disseminate Direct Loan Program publications	
11	DEVELOP & DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS	
12	TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)	
13	ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)	
13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more	
13.2	Update FSA-wide risk management and default prevention inventory.	
13.3	Complete the work on the implementation of the life-time default rate measure.	
13.4	Identify and enhance current delinquency/default prevention tools for the DLProgram	
13.5	Conduct vulnerability assessment	

ACTION PLAN STATUS AT A GLANCE

as of August 6, 2004

FSA No.	Indicator	Status
14	IMPLEMENT HIGH QUALITY CUSTOMER SERVICE TO THE DL PORTFOLIO	
15	IMPLEMENT PLAN TO IMPROVE CONTRACTOR OVERSIGHT TO DL CONSOLIDATION OVERPAYMENTS/UNDERPAYMENTS	
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	
16.1	Perform cohort default rate calculations, send, and post	
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes	
16.5	Participate in the formulation of school cohort default rate initiatives	
16.6	Provide monitoring functionality of GA and Lender reasonability on a monthly basis	
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP	
16.8	Implement Education Credit Management Corporation (ECMC) file format changes	
17	RE-COMPETE CONTRACT FOR NSLDS MAINTENANCE/OPERATIONS	
17.1	Award new contract	
17.2	Monitor and manage transition to new contractor	
18	RE-COMPETE CONTRACT FOR FP DATA MART MAINTENANCE/OPERATIONS	
18.1	Award new contract	
18.2	Monitor and manage transition to new contractor	
19	PERFORM MAINTENANCE/OPERATIONS ACTIVITIES FOR THE FP DATA MART	
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	
20.1	Monitor and evaluate web page hits to drive future postings to portal	
20.2	Maintain current and relevant information to financial partners' user community	
20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal	
21	PERFORM LEAP/SLEAP ACTIVITIES	
21.1	Review, evaluate, reconcile, and prepare performance reports	
21.2	Prepare and submit clearance paperwork	
21.3	Review/approve applications from states. Obligate, generate, and mail grant award notifications	
22	PERFORM VOLUNTARY FLEXIBLE AGREEMENT (VFA) ACTIVITIES	
22.1	Perform cost neutrality analysis and provide results	
22.2	Prepare performance measure assessment and benchmarking reports	
22.3	Evaluate new applications for VFA	
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	
23	PERFORM MAINTENANCE/IMPROVEMENTS TO THE FP ELECTRONIC RECORDS MANAGEMENT (ERM) SYSTEM	
23.1	As appropriate, integrate ERM work with other FSA business units	
23.2	Analyze and evaluate the current use of the ERM system to identify improvements	
24	PROMOTE EFFECTIVE/EFFICIENT COMMUNICATIONS INTERNALLY & EXTERNALLY	cancelled
24.1	Coordinate and enhance communications within Financial Partners and externally	cancelled
24.2	Hold quarterly checkpoints for all areas of FP service concerning communications	cancelled
25	ENHANCE PROGRAM MONITORING & OVERSIGHT (FP)	
25.1	Participate and provide Financial Partners Channel support for ED audit	
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	












































ACTION PLAN STATUS AT A GLANCE

as of August 6, 2004

FSA No.	Indicator	Status
25.3	Analyze and collect third-party audit findings	✓
25.4	Utilize GA/lender scorecards to reduce risk and improve review process	✓
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI)	✓
25.6	Conduct vulnerability assessment	G
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	G
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	G
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	G
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	Y
30	MANAGE FMS OPERATIONS	G
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	G
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	G
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	G
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	G
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	NR
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	G
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	G
37.1	Release GovLoans Gateway	✓
38	PROVIDE HIGH QUALITY INFORMATION, RESEARCH AND INFORMAL PROBLEM RESOLUTION SERVICES TO STUDENT LOAN BORROWERS AND OTHER PARTICIPANTS IN STUDENT AID PROGRAMS	G
39	CONDUCT REAUTHORIZATION ACTIVITIES	NR
40	POLICY LIAISON PLACEHOLDER	NR
41	PLAN AND MANAGE FSA CONFERENCES	✓
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	G
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	G
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	G
45	MATURE ENTERPRISE-WIDE PROCUREMENT PLAN	✓
45.1	Complete market research to resolve plan issues	✓
45.2	Synch Plan w/BIG End State Vision	✓
46	DEVELOP ACQUISITION WORKFORCE	G
47	IMPLEMENT ENTERPRISE CONTRACT PERFORMANCE MONITORING MEASURES AGAINST NEW SYSTEMS CONTRACT AWARDS	G
47.1	Incorporate CSB into enterprise process	✓
47.2	Incorporate Front-End Business Integration Systems (FEBI) into enterprise process	G
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	G
48.1	Establish monitoring and reporting process for government furnished property	✓
48.2	Establish reporting process to monitor vendor performance	G
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	G
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	G
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	cancelled

ACTION PLAN STATUS AT A GLANCE

as of August 6, 2004

FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	
54.1	Continue Intern Program	
54.2	Conduct FSA Orientation	
54.3	Implement results of One-ED Competitions	
54.4	Update Skills Catalog/Learning Tracks	
54.5	Implement Workforce Alignment Strategy	
54.6	Update FSA Human Capital Plan	
55	PERFORM FACILITIES MANAGEMENT ACTIVITIES	
55.1	Implement facilities needs	
55.2	Coordinate security needs	
55.3	Administer records management	
55.4	Coordinate the distribution of the Transit-Benefit program	
56	REVIEW CREDIT REFORM ESTIMATES	
57	DEVELOP TRIAL BALANCE CAPABILITY FOR COD AND CSB	
58	SUPPORT THE IMPLEMENTATION OF ORACLE FEDERAL FINANCIALS RELEASE 11i	
59	IMPLEMENT AUTOMATED BUDGET FUNDING ENTRY SOLUTION	
60	IMPLEMENT FORMS 2000 ADDITIONAL ENHANCEMENTS	
61	IMPLEMENT ENTERPRISE DATA STRATEGY INITIATIVES	
61.1	Map current state and future state business flows of data	
61.2	Develop requirements and initial design for common identifiers for schools and students	
61.3	Develop an integrated data warehouse and Data Mart strategy	
61.4	Develop technical standards, conventions and data management guidelines	
61.5	Determine current data quality and establish a target state plan and quality assurance process	
61.6	Develop an enterprise-wide extensible markup language (XML) technical architecture framework to enhance data sharing and standardization with our external customers	
61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management Oversight (eCMO), NSLDS and electronic Campus-based systems	
61.8	Conduct market research to validate the feasibility of the target conceptual design	
61.9	Develop the detail Data Quality Execution Plan	
61.10	Develop a holistic XML Management Plan	
61.11	Implement SSIM as a pilot on renewal applicants	
62	BEGIN THE IMPLEMENTATION OF COMMON SERVICES FOR BORROWERS (CSB)	
62.1	Award Contract	
62.2	Begin implementing Phase I of the FSA-approved transition plan	
63	IMPROVE SCHOOL PARTNER OVERSIGHT	
63.1	Implement Integrated Partner Management (IPM) system	
63.2	Develop Consolidated requirements for IPM system	
63.3	Develop enrollment high-level design	
63.4	Develop access high-level	
63.5	Develop Routing ID (RID) high-level design	
63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system	
63.7	Begin requirements gathering for eCMO	
63.8	Procure the design of a workflow tool for SEC	cancelled
64	IMPROVE THE ACCURACY OF APPLICANT DATA	

ACTION PLAN STATUS AT A GLANCE

as of August 6, 2004

FSA No.	Indicator	Status
64.1	Improve the effectiveness of verification	✓
64.2	Restructure CPS to become a multi-year database	✓
64.3	Implement ISIR Data Mart	✓
65	CREATE A TARGET STATE VISION OF A FRONT END BUSINESS INTEGRATION (FEBI)	✓
65.1	Conduct market research	✓
65.2	Issue CPS Statement of Objective (SOO)	✓
66	RE-ENGINEER NSLDS (PENDING DATA STRATEGY OUTCOME)	cancelled
67	PREPARE TO IMPLEMENT IRS DATA MATCH	G
68	CONTINUE LEARNING COUPON PROGRAM	Y
69	PROVIDE CAREER ZONE SERVICES	G
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	✓
70.2	Develop and implement long-term mass marketing strategy	G
71	RE-ENGINEER EDEExpress	Y
71.1	Conduct A & F Study with product registration	✓
71.2	Link application processing to FAA Access	✓
71.3	Implement Return to Title IV Web Release	Y
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	cancelled
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	✓
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

Key:



On Track



Progress Concerns



Progress Concerns by EPMS



Not Reported



Management Intervention Required



Completed

Cancelled

The project will not be completed in FY 2004 due to a shift in FSA leadership priorities, and therefore, unappropriated resources.

Operations

Discretionary

FSA Project Status Report

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
1	ADS	Implement student aid awareness initiatives.			
		8/6/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have exceeded their success measures. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion on or before 9/30/04.	60%	Green
		7/23/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have exceeded their success measures. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion on or before 9/30/04.	55%	Green
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).			
		8/6/2004	General progress continues in all identified areas. Of particular note, the Google servers arrived this week and should be transitioned by the end of the 2004 calendar year.	85%	Green
		7/23/2004	Progress continues in all identified areas. Of particular note, an improvement was made to the Lotus Notes software as a result of ongoing meeting with the EZ Audit staff.	81%	Green
6	ADS	Administer Campus-Based (eCB) activities.			
		7/23/2004	With the posting of the FISAP software to the e-CB web site on 7/18/2004 (milestone 6.5), this project has now been completed.	100	Completed
8	ADS	Expand eZAudit initiative.			
		8/6/2004	As of 8-1, 4,502 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed milestone 2, but will continue to report on volume of submissions rec'd through the end of the year.	90%	Green
			Task order awarded July 30.		
			Overs 90% of all schools have registered.		
		7/23/2004	Market research interviews begin 7-22 through 7-28.	85%	Yellow
			SOW went to Accenture. Proposal due back this week. Award of Task Order within 2 weeks.		
			As of 7-18-04, 4,267 annual audit submissions have been rec'd. 1,743 submissions have passed the QC screening.		
			We will monitor this workload to assure timely processing.		
			As of 7-18-04, 3,186 schools have registered, about 73% of all schools.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status_Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
9	ADS	<i>Enhance program monitoring and oversight.</i>		
		8/6/2004	<p>1: For the biweekly period 7-19-04 to 8-1-04, 99% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.</p> <p>2: The dry run training for the FY 2004 Compliance Initiative was conducted on 7-27 & 28. SEC briefed Management Council on 8-2-04. Next steps include briefing OPE and OGC on 8-12.</p> <p>3: School Relations Continues to make progress with a partnership with Campus Based with research on HBCU Perkins default.</p> <p>4: CIO has agreed to fund the updates to the reporting mechanism for the next cycle of data submission</p> <p>5: ISIR Analysis Tool training is underway.</p> <p>6: Work this reporting period included a status briefing to the ASIDS management council and additional interviews and working meetings with subject matter experts. Work to identify vulnerabilities and potential mitigation strategies associated with student identification and authentication continues. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.</p>	81% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/23/2004	<p>9.1 For the biweekly period 7-5-04 to 7-18-04, 96% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.</p> <p>9.2 On 7-14, Fin Partners decided to initiate certain changes at the NSLDS that will provide simplified options for transfer student monitoring for institutions with additional locations. Therefore, we are delaying further contact with institutions that do not yet have transfer student monitoring profiles for one or more of their additional locations. We are continuing to contact institutions where the main campus only has not yet established their profile. More info on school options for locations to be forthcoming in another week.</p> <p>For the first 3 qtrs of FY 04, SEC conducted a comprehensive review of 1,990 unduplicated schools, or 32% of the total population, covering 37% of Title IV funding. An add'l 152 schools received an on-site program review and 84 schools received an on-site technical assistance visit.</p> <p>9.3 Work continues on the HBCU Perkins project and the tracking database development is planned on being finished in the upcoming week.</p> <p>9.4 ASEDS is working with CIO to fund the updates to the reporting mechanism for the next cycle of data submission and analysis.</p> <p>9.5 ISIR Analysis Tool training expected to be finished in mid-August</p> <p>9.6 Work this reporting period focused on internal controls and vulnerabilities in monitoring schools that deliver Title IV aid. During the next reporting period, work will include more focus on identifying vulnerabilities around student identification and authentication.</p>	75% Green
10	ADS		<p><i>Produce school publications and materials.</i></p> <p>8/6/2004 1: The FSA handbook has requested a date change at the milestone level due to new requirements that they are encompassing. The project was initially delayed because it has a new scope from the previous years and getting it through the proper channels took longer than expected. It is believed that the project will be finished by the new projected date.</p> <p>2: The PLUS Basics brochure is being reviewed by OPA. The students brochure is out for review and comment. There are 73 back-ordered requests for publications or documents at the warehouse. The majority of these are for the Direct Loan PLUS Basics brochure that is currently being revised, and a few are for the students brochure.</p>	78% Red

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/23/2004	10.1	There hasn't been movement in this milestone for two weeks. The owner believes that Terri may need to get involved to speed the POC approval process.	76% Red
			10.2:	The PLUS Basics brochure is designed and was reviewed by management and the Direct Loan Coalition last week. Final edits will be completed this week and the document will be submitted to OPA. Once approved, it will be submitted for printing. The students brochure will be finalized shortly after the PLUS is complete. There are 58 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.	
11	ADS	<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>			
		7/23/2004		This project has been completed.	100 Completed
		7/19/2004		--Award new training contract by April 2004.	100 Completed
				The new training contract was awarded on Friday, July 16. Vendors selected are Pearson Government Solutions and two small businesses: Windwalker and Information Experts.	
13	BS	<i>Enhance program monitoring and oversight.</i>			
		8/10/2004		Total non-consolidation recoveries have now reached \$1.361 Billion, an increase of 24 percent from the same period, thru July 30th, in FY03. This represents 8.55 per cent of the FY04 portfolio balance.	91% Green
				The Default Prevention Workgroup met on July 30 and reached agreement on strategies, strategy owners, and the tracking of initiatives. A new strategy for Fraud Prevention was established and will include verification processes for FASFA and Conditional Disability claims. A notebook was created on a shared drive to permit strategies and action steps to be updated as needed and to provide an electronic notebook for outside entities (i.e. GAO) to review FSA efforts to reduce the high-risk status.	
				The Independent Verification and Validation (IV&V) team has delivered the plan for review of the CSB project. The major areas that will be reviewed and monitored are Requirement Management Process, Risk Management, Change Management, Test Process, Security Risk Assessment and Certification and Accreditation Support, Review Financial Controls, Production Readiness Review recommendations, and Maintainability Assessments. Each of these areas will be reported on the FY05 performance plan.	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/23/2004	Total non-consolidation recoveries reached \$1.321 Billion, an increase of 24 percent from the same period, thru July 16, 2004, in FY03. This represents 8.30 per cent of the FY04 portfolio balance.	88%	Green
			The Default Prevention Workgroup will meet July 30 to reach a final agreement on strategies and the tracking of initiatives. The team has divided the initiatives into two categories: "established production" and "tried and not implemented into production". The Risk Management Group will continue to extract information from the NSLDS for FFEL program for cohort years 1994-1998. Direct Loan calculations, based on the year of origination, are complete for consolidated and non-consolidated loans for 1994-1998.		
			The independent Verification and Validation (IV& V) team is continuing to review the functional requirements, detailed designs, and test plan.		
14	BS	<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i>			
		8/10/2004	The figures for e-servicing will be available mid-August.	80%	Green
		7/23/2004	The figures for e-servicing will be available at the end of July –mid August. The results will be provided on the next report. The CSB web team is continuing development of the new Borrower Services website. The development schedule for the site is on track and the completion date for Phase one, as scheduled, will be October 8, 2004.	80%	Green
15	BS	<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>			
		8/10/2004	The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for the month of July. The target for overpayments for FY04 is \$2,265,585; the actual dollar amount in July 2004 was \$1,815,994. The target for under payments for FY04 is \$778,092; the actual dollar amount was \$536,716. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month thru September 30, 2004.	90%	Green
		7/23/2004	The statistics for Loan Consolidation overpayments and underpayments are released monthly. The next report on this item will be issued mid-August.	80%	Green
16	FPS	<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>			
		8/6/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work continues on GA and Lender Reasonability.	88%	Green
		7/23/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work continues on GA and Lender Reasonability.	86%	Green
19	FPS	<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>			
		8/6/2004	The Contractor continues to provide on-going maintenance support. Reports for this reporting period have been submitted.	92%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/23/2004		The FPDM Operations team is working with FMS Operation team to address two outstanding issues: 1) extracting 10/03 -12/03 LaRs data from the FMS, and 2) have FMS only send new LaR's data to the FP Data Mart. Resolutions for both issues are currently in testing.	88% Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>			
		8/6/2004		The What's New template has been deployed. The Contractor continues to provide on-going maintenance support.	97% Green
		7/23/2004		The What's New template for the FP Portal has been redesigned.	95% Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>			
		8/6/2004		Progress on the Performance Measure milestone for performance assessment and benchmarking reports has been impacted by the additional data requests from Ernst & Young in support of maintaining our clean audit opinion. Working to address the impacts so that a test Benchmark report can be published by 9.5.2004. The VFA Evaluation processing timelines document is complete and the annual report tracking processing timeframes will be published on Friday, 10.1.2004 as scheduled. This will cover processing for the Colorado, Missouri, NSLP/EAC, and USAF applications.	96% Green
		7/23/2004		FPS is responding to questions/comments associated with the draft Performance Measure Report and the VFA Evaluation Process document. FPS began conversations with CSAC/EdFund regarding the cost neutrality of the existing agreement and will be working with them over the next few weeks to identify solutions that achieve cost neutrality and reflect the current direction being taken with new VFA's. Until this reporting period, FPS was on schedule to complete all VFA/GA program reviews by 9.30.2004. ASA is in the process of moving and they have requested an extension on the program review originally scheduled for September 2004. We have provided them with a two-month maximum extension.	95% Green
25	FPS	<i>Enhance program monitoring and oversight.</i>			
		8/6/2004		* FP has received the three additional months of GA subrogation and receivable data from the GAs as requested by Ernst & Young (E&Y). * Reviews at the Iowa and New Hampshire guaranty agencies are at midpoint. A revision of the Compilation of Servicer Review Findings and Observations was released. * Work continues on the NSLDS vulnerability assessment. Work is currently at midpoint and continues to be on track for completion no later than Thursday, 9.30.2004.	85% Green
		7/23/2004		- Awaiting receipt of three additional months of GA subrogation and receivable data as requested by Ernst & Young (E&Y). - Review of the Nebraska guaranty agency was completed, as well as reviews at three servicers. - Completed collection and analysis of third party audit findings. Completed a summary report of findings for FY03. - The GA and Lender scorecard have been integrated into the FY05 review process. - Work on the NSLDS vulnerability assessment task order continues.	79% Green
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>			

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		8/6/2004		A significant amount of financial statement audit material has been provided to our IPA's, E & Y year-to-date. July was our heaviest PBC month, as we provided a huge amount of information during the month of July. Next week E&Y will complete it's final site visit, to Raytheon for Debt Collection processes.	75% Green
		7/23/2004		July is a very heavy Provided by Client (PBC) month, as many large items are due during this timeframe. They include downloads, reconciliations, sample material, and scheduling conferences with the auditors to respond to questions.	65% Green
27	CFO	<i>Award contract to perform independent system internal control reviews to enhance financial management." In addition, the new Success Measure should be changed to read: "Award contract by September 30, 2004.</i>			
		8/6/2004		On July 28th, the IPC approved a scope change to this project. It was agreed to change from completing 2 system internal control reviews to completing the contract award for the internal control review. We are continuing to negotiate with bidders regarding a BPA and Task Order 1 (FMS review). In addition, we are finalizing the SOO and IGCE for Task Order 2 (CSB and other system reviews). The BPA and both task orders are expected to be awarded by the end of the fiscal year.	60% Green
		7/23/2004		CFO presented scope change, on Project 27, to the IPC on Wednesday, July 21st. IPC recommended that CFO return to the IPC on Wednesday, July 28th with a detailed project plan. CFO will submit the project plan at the next IPC.	20% Red
		7/19/2004		Per our meeting this morning CFO is requesting a scope change on project 27. CFO is unable to get the contract awarded and successfully commence internal control reviews before the end of the fiscal year. Jay Hurt will represent CFO at the IPC on Wednesday, July 21st. The project should be changed to read: "Award contract to perform independent system internal control reviews to enhance financial management".	19% Red
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>			
		8/6/2004		We have completed data gathering meetings with FSA program staff in all FSA divisions to verify organization structure, activities, and allocation methodologies. We are now making modifications to the FY2003 model to address issues identified in those meetings. The presentation of a completed FY2003 model to the Management Council was postponed from 7/30/2004 to 8/20/2004 to accommodate the required changes from the program staff meetings and additional review time by the steering committee. We feel confident that this project will be successfully completed by the end of the fiscal year.	68% Green
		7/23/2004		CFO completed presentations to senior management and GAO during the week of 7/12-7/16. CFO has been meeting extensively with FSA program staff in all FSA divisions to verify organization structure, activities, and allocation methodologies. We are still on-schedule to complete the final FY2003 model by July 31st.	55% Green
29	CFO	<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>			

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		8/6/2004	<p>Monthly Reconciliations: Reconciliations for July 2004 are currently being performed and are expected to be completed timely.</p> <p>Reconciliation Reengineering Project: Financial Management Group/AD has requested to move the contracting vehicle to the Oracle 11i contract. This request was submitted to Contracts in early July and is still awaiting approval.</p> <p>Other: Production Environment for Checkfree - The production server has been delivered to the VDC, but it is not yet up and operational. FSA CFO and CIO are collaborating together on the technical and functional aspects/requirements. Specifically, CFO/AD is continuing to determine the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations and FSA/CIO is assisting with the technical aspects of the project. A Checkfree representative came to ED on 7/26 to work with FSA/CFO and respective contractor staff to set up the FMS to FMSS reconciliation, which will be performed subsequent to the completion of the July reconciliations. Additional training from Checkfree is scheduled for the week of August 16.</p>	43% Yellow
		7/28/2004	<p>Project status is yellow and 42% due to the fact CFO has not been successful in procuring a contract for the Reconciliation Reengineering Project. CFO is working with Contracts to move this vehicle to the Oracle 11i project. Once the contract is successfully moved the project will go to green and % complete will move much higher.</p>	42% Yellow
		7/23/2004	<p>Monthly Reconciliations: Reconciliations are being performed and completed on time - a record of 8 days for the June 2004 reconciliations compared to the 30-day metric.</p> <p>Reconciliation Reengineering Project: CFO will be moving the contracting vehicle to Oracle 11i pending approval from Contracts.</p> <p>Desk Operating Procedures: All (total of 8) desk operating reconciliation procedures have been finalized.</p> <p>Other: Production Environment - The production server has been ordered and should arrive at the VDC within the next month. FSA CFO and CIO are collaborating together on the technical and functional aspects/requirements. CFO is continuing to determine the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations and FSA/CIO is assisting with the technical aspects of the project.</p>	42% Yellow
30	CFO	<i>Manage FMS operations.</i>		
		8/6/2004	<p>FMS Operations continues to run smoothly. A post implementation review was completed for the Form 2000 enhancement task orders, citing high ratings (5 out of a possible 5) in most of the review categories. Also, the July 2004 accounting period was closed within 2 business days, once again meeting the metric for closing time and allowing more time for the reconciliation teams to tie FMS balances to operating partner and general ledger balances.</p>	86% Green
		7/29/2004	<p>FMS Operations continues to run smoothly. The Operations contractor successfully met all of the operational metrics, earning a 5% incentive bonus. Also, all 9 CCB-approved change requests were implemented in the 6/20 FMS release, requiring no re-work. Finally, the June accounting period was closed within 2 business days.</p>	78% Green
		7/23/2004	<p>FMS Operations continues to operate smoothly.</p>	78% Green
31	CIO	<i>Develop and deploy Enterprise Performance Test Architecture.</i>		

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				<i>Status</i>
		8/6/2004	FAFSA GC Issue Testing is wrapping up. Testing is complete for Ombudsman, FP Portal, and Schools portal. Planning and scripting activities are being performed for eMPN. FAFSA 9.0 Test planning is proceeding.	85%
		7/30/2004	FAFSA GC Issue Testing continues. Final tests will be performed this week. Scripting is complete for Ombudsman, FP Portal, Schools portal. Base line tests have been performed. Planning and scripting activities are still being performed for SAIG and eMPN.	82%
		7/23/2004	FAFSA GC Issue Testing continues. A link has been discovered between GC and the number of servlets loaded. Planning is continuing for Ombudsman, FP Portal, Schools portal, SAIG and EMPN planning is proceeding. Scripting is in the final stages of the Schools and FP portal test. Planning for the process and technology libraries is proceeding. The percentage complete for this project has increased significantly for this reporting period from 21% to 80%. The reason for this increase is that the project was being reported on an annual basis based on contract award which occurred in May vs. a Fiscal Year basis ending in September.	80%
		7/16/2004	FAFSA GC Issue Testing continues. Base line tests have been completed. EMPN testing is proceeding. Ombudsman, FP Portal and EMPN planning is proceeding. Planning for the process and technology libraries is proceeding. Initial discussions with Students portal and SAIG have begun.	21%
32	CIO	<i>Provide Enterprise and Data Architecture management.</i>		
		8/6/2004	A presentation was given to the Institute for Defense and Government Advancement titled "Re-Drawing the Federal IT Landscape with Effective Federal Enterprise Architecture Reference Model Implementation" with a focus on how FSA implemented / maintains the OMB' reference models. The presentation stimulated questions and some concern was raised regarding OMB's expectations to using EA in preparing budget submissions. A Community of Practice will begin with DOE and DOI. The EA Team is preparing an estimate to implement the process of entering Exhibit 300 data into an excel spreadsheet which can then be auto-translated to XML for delivery to eCPIC and to OMB. All EA Review Reports have been submitted to Steve Allison and the Standards Guide has been revised for 2004. The percentage complete for this project has been increased significantly to better align with the 9/30/04 end date for this on-going project.	85%
		7/30/2004	The EA Team supported ED/CIO in a presentation to the Inspector General on progress being made with Enterprise Architecture. The ILSC team will be performing their data modeling task in Popkin Systems Architect. The EA team is working to provide the ILSC team with access to the Popkin Repository and their own Data Modeling "sandbox". EA is providing a "proof of concept" demonstration to Steve Allison (CPIC) on entering Exhibit 300 data into an excel spreadsheet which can then be auto-translated to XML for delivery to eCPIC and to OMB. This would allow the EA team to export the EA reference model information from Popkin in an XML format to the eCPIC tool for end-user validation. Once validated, the EA team can import validated reference models into Popkin. The EA team is contacting the ED/CIO ITIM team to determine feasibility of importing FSA EA data into the eCPIC tool.	52%
		7/23/2004	The ASG met to discuss the governance process and the need for a "fast track" process to get tools/products approved in a quick, but structured process. The Team continues to meet with EPMS team who is completing the BRM alignment task with the Business Owners. The Team is finalized the last of the "lite" Business Cases EA Reviews and drafted another chapter for the EA Case Study publication.	50%

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		17/16/2004		The EA Team modified the macros used to generate Popkin Reports in Word with Table of Contents and logos. Created *draft* presentation for Denise's speaking engagement at the Institute for Defense and Government Advancement conference on FSA's use of FEAPMO Reference Models. EA Team completed additional business case reviews, drafted another chapter for the EA Case Study publication, created data schema, interface description, server diagram, business process and component innerconnection templates to be used by vendors to submit EA artifacts to FSA on a regular basis. The ASG met to begin discussions on potential standards needed in support of the changing target architecture and procurements. The group will meet weekly until a revised Standards Guide can be published.	48% Green
33	CIO	<i>Provide security and privacy support to FSA business units.</i>			
		8/6/2004		Contracts working towards award for BPA with expected award next week. Continuing working C&A validation efforts for all FSA systems.	90% Green
		7/30/2004		Final decision on the BPA given to contracts. contract award in progress. Currently involved in the DLSS, VDC C& A processes.	75% Green
		7/23/2004		Completed review of proposals and working with contracts for award of BPA. Completed meetings with COD, VDC, and DLSS for rules of engagement for follow-on C&A activities.	75% Green
		7/16/2004		Continuing to work with systems to update their plans of actions and milestones. Revalidation of C&A activities have started with rules of engagement meetings for the VDC, DLSS, and COD. Created a timeline for C&A activities for FSA systems. Continuing with reviews of received proposals for security and privacy support work.	75% Green
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>			
		8/6/2004		ITA: The team responded to one ITA production support page and 6 maintenance service requests. Students Portal, Financial Partners Portal, and Student Aid on the Web have been successfully installed in their WAS 5.0 production environments. We have presented PEPS with requirements for their proposed migration to ITA. We have completed WAS 5.1 development and test environments for FAFSA. EAI: No major production problems were reported during the week; the team responded to 22 COD customer service inquiries. ECMs have been submitted to implement the EAI Security Exit and the MQSeries Channel Listener upgrade. EAI is developing a VDC resource request package for the installation of IBM WBI Message Broker and the upgrade of DataIntegrator.	84% Green
		7/30/2004		ITA: The team responded to one ITA production support requests and 5 maintenance service requests. While we await FSA purchase of the necessary Interwoven license, we are preparing an architectural paper on the direction FSA should proceed with Interwoven. After a third meeting with the PEPS team, we committed to providing a document listing requirements for what it would take to include PEPS in the ITA. We are making significant progress with the FAFSA performance testing in trying to discover the cause of garbage collection issues. EAI: No major production problems were reported during the week; the team responded to 29 COD customer service inquiries. EAI has made changes to implement MQSeries Channel Listener; it will be rolled out into production in phases over the next 5 weeks. EAI met with CSB to clarify our role in provide consultant support. As part of the plan to migrate eMPN to the ITA environment, EAI worked to configure the ITA test environment to receive the PEPS daily feed.	82% Green

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		7/23/2004	ITA: The team responded to two ITA production support requests and 29 maintenance service requests. FAFSA is being tested in WebSphere 5.1. We met again with PEPS, providing planning support for their move to ITA. We are also supporting the performance testing of FAFSA. EAI: No major production problems were reported during the week; the team responded to 14 COD customer service inquiries. The team continues to support CSB's MQ rollout and is working closely with the ITA team on preparations for eMPN's migration. EAI will be meeting with IBM to discuss a rollout strategy for WBI.	81%
		7/16/2004	ITA: No major production problems were reported during the week; the team responded to 6 maintenance service requests. Fix pack 1 for WAS 5.1 has been installed in FAFSA and ITA development. Student Aid on the Web, Schools Portal, and Financial Partners Portal are all being tested in their WAS 5.0 environments. Preparations are underway to migrate PEPS and eMPN to the ITA environment. We are supporting the performance testing of FAFSA. EAI: No major production problems were reported during the week; the team responded to 21 COD customer service inquiries. The team provided support for CSB's MQ installation and is working closely with the ITA team on preparations for eMPN's migration. EAI has initiated the process of making WBI implementation and the DataIntegrator upgrade official projects.	41%
35	CIO	<i>Support the FSA IT assets at the VDC with lines of service including, full and incremental backups, annual disaster recovery tests, disaster recovery location and services, quarterly capacity planning, annual penetration testing, test environment support, security, compliance to all appropriate FSA, ED, & Federal policies, regulations, statutes.</i>		
		7/16/2004	Continuing on schedule. Refresh is 90% complete.	90%
36	CIO	<i>Continue Enterprise Quality Assurance Program to support the FSA CIO in conducting systems assessments and evaluations consistent with best practices for Solution Life Cycle (SLC) and Capital Planning and Investment Control (CPIC) processes.</i>		
		8/6/2004	No change.	85%
		7/30/2004	Conducted first In-Process Review (IPR) for the CSB development team on July 29. IPR focused on IV&V issues of high risk to project success or development areas that demonstrate weak processes. Post-Implementation Review (PIR) for eZ-Audits, Release 1 kickoff was conducted on July 28. PIR vendor re-compete and selection process is underway at this time. QA Team accepted the IV&V support plan for the CSB development effort on July 28. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	83%
		7/23/2004	Dan Callahan is coordinating the first In-Process Review (IPR) for CSB IV&V support with the CSB leadership and IV&V contractor, tentatively set for July 29. QA Team continuing to coordinate Post-Implementation Review for eZ-Audits Release 1 kickoff date with Molly Wyatt. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	81%
		7/16/2004	Final FY04 transfer of funds document was passed to Glenn Perrys office and OGC for review on 13 July 2004 by Deb Wrabley. Draft Acquisition Plan for re-compete and selection of new Post-Implementation Review support vendor under review by QA Team. QA Program Manager continuing to explore ROI methodology for QA Team activities. Consulting with Jim Coffman of FSA Contracts Performance Team in creating ROI model and processes. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	77%
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>		

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		8/6/2004		Harvard's Kennedy School of Government, National Center for Digital Government is conducting an independent study of the 25 E-Gov initiatives to better understand the elements of and challenges to success in interagency collaboration. OMB's E-Gov Office sanctioned the E-Gov initiatives' participation in the study and asked the E-Gov initiative program managers to complete an online survey (completed in May 2003) and participate in interviews (completed in October 2003 and February 2004). As a follow-up to the initial data gathering, Harvard provided follow-up questions and scheduled an interview with ED's eLoans team for August 10. In preparation for the interview, a copy of the questions and draft responses have been provided to OMB's E-Gov office, as well as FSA Communications.	85% Green
		7/30/2004		As of July 26th, 15,332 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov. The August edition of InfoSource was sent to list subscribers on July 28. Students.gov received 56,740 visits (1.4 million hits) during the week of July 18 - July 24, 2004.	83% Green
		7/23/2004		The GovLoans working group met on Wednesday, July 21, to discuss the GovLoans' progress toward its second release and official launch in late September 2004. Human Factors International presented official findings and recommendations from the usability testing conducted on June 29-30, 2004. ED/OCIO and FSA responded to an E-Authentication request for a government-wide "data call" from systems classified as "major" under the quarterly Federal Information Security Management Act (FISMA) Plan of Action and Milestones (POA&M). Students.gov received 53,535 visits (1.3 million hits) during the week of July 11 - July 17, 2004.	81% Green
		7/16/2004		On July 13, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. Students.gov received an estimated 55,533 visits (1.2 million hits) during the week of July 4 - July 10, 2004. On July 7, the students.gov team met with VDC technical staff to get the results of their investigation into discrepancies in the number of students.gov site visits reported by WebTrends. New dispatcher software installed at the VDC on May 30 defines site visits differently than the old software, so although the amount of activity hasn't actually changed, the number of visitors to students.gov will appear lower than in the past. This potentially affects every FSA site that uses WebTrends and migrated from eNetwork Dispatcher to the Cisco dispatchers. As a result, we will not have the basis for a meaningful comparison of visits before 5/30/04 and visits after 5/30/04.	77% Green
38	OMBD	<i>Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.</i>			
		8/6/2004		Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.70 (through 7/23/04)	83% Green
		7/23/2004		Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.68 (through 7/09/04)	79% Green
41	CMS	<i>Plan and manage FSA conferences.</i>			
		7/23/2004		Achieved current customer satisfaction rating and reviews of FSA sessions were increased to 30%. This is complete.	100 Completed
42	CMS	<i>Manage, develop and update content for FSANet.</i>			
		8/6/2004		-The software filter is not yet fixed. Unable to provide FSANet statistics.	90% Green

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		7/23/2004	-On July 14, two updates were provided on FSAnet. The return of the Water Cooler and Senior Leadership notes. The Water Cooler contains three different forums: FSA Assists, FSA Car Pool and FSA Blackboard. FSA Assists is an online forum for FSA employees to pose questions to management about issues impacting FSA. Employees can ask questions publicly or privately. The FSA Blackboard is for employees to post announcements such as retirement celebrations, lost items, etc.	80%
			-FSAnet web stats are still unavailable as it was determined that a software filter was not placed back into the web trends configuration file after the move from the network dispatcher to CSC. This is being corrected so we should have stats soon.	Green
43	CMS	<i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i>		
		8/6/2004	Controlled Mail - 205 letters were handled and all are on time. Privacy cases - 2 new cases and 3 closed cases.	90%
		7/23/2004	Controlled Mail - 208 letters were handled and all are on time.	80%
			FOIA cases - There were 9 new FOIA cases and 5 cases closed.	
			Privacy cases - There were 4 new privacy cases and 2 cases closed.	
44	CMS	<i>Develop and implement internal and external communications strategy.</i>		
		8/6/2004	-USNWR will interview Kay Jacks and Bill Leith on FAFSA tips, mistakes, etc. The interview is scheduled for Aug. 17. -Daily Newsclips were on time. Articles about the current financial aid scam where someone is impersonating an ED employee and offering to replace their loans with an \$8k grant. -The July issue of FSA Now was release the last week of July. -Hot Issue List to Sec. Paige is on time. -FSA Weekly News to employees is on time. -Weekly Report to Sec. Paige is on time. -Lobby Monitor. A new plasma screen is being ordered by FSA CIO. The monitor is featuring the counting down of days before the Learning Coupon expires. -FSA Communications met with OPA to discuss an exemption from PAPRS for some of our publications. OPA agreed that FSA does not "substantially revise" our pubs annully and therefore they will not be subject to the PAPRS Concept Board. -FSA Communications is working with FSAU planning a training class on our publications process. Employees will learn the new, simplified procedures and receive the writing tools in order to do an even better job. Training is tenatively scheduled for Oct. 1st. FSA Comms will work with FSA Contracts to devise standard language stating that the AP Style Guide must be used when contractors are creating/printing publications for FSA. -FSA Comms is assisting ASEDS via OPA in getting the Direct Loan Basics for Parents brochure updated and printed.	90%
				Green

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		7/23/2004	<p>-Govt. Computer News should print an article on Terri/FSA on Monday, July 26.</p> <p>-Hot Issues List to Sec. Paige on time.</p> <p>-Daily newsclips on time.</p> <p>-FSA Weekly News to employees on time.</p> <p>-Weekly Report to Sec. Paige on time.</p> <p>-Lobby monitor is still being evaluated to find out why the large screen stopped functioning. A temporary, smaller screen is now operating in the lobby until the large screen can be fixed. Slides have been updated with the 7/15 Dashboard.</p> <p>-Information Requests - To date, 309 requests have been received while 21 are outstanding and one is on hold. The last three requests were: Wash. Post calling about the current scam where someone is impersonating an ED employee and asking students for their bank act numbers so they can get \$8k in grant money to replace their loans; OLCA gave us a list of schools to be verified if they are Direct Loan schools or not; LEAP disbursements made after 120 days.</p> <p>-FSA Communications continues to help FSAU create a new employee orientation video. The secretary's videographer, FSA Comms and FSAU held a meeting to discuss the bad first draft. The videographer was given an "out" but declined as he wants to create something to please everyone and gets our message across to new employees. Next steps, new footage of students was filmed, will utilize some sceens from the ACS bid video, music will change, snaps will be quicker and FSA staff will go to FB6 and help "piece together" a quicker, more stimulating video. It's highly unlikely the video will be ready for the September new employees. The videographer's PC has had problems too and those are slowly being corrected.</p>	80%	Green
46	EPMS	<i>Develop acquisition workforce.</i>			
		8/9/2004	The workforce continues to attend training as forecasted in the annual training plan. The ongoing training assessment and evaluation process continues to provide valuable information. The evaluation effort revealed that 75% of the individual training forecasted for FY 04 is complete or scheduled for completion by the end of the physical year. The ongoing organization re-engineering process within APCMG provides an opportunity to commit the remaining training budget. The re-engineering effort combined with other additional training, not previously forecasted, will bring this task to 100% completion by September 30, 2004 as projected.	75%	Green
		7/22/2004	The workforce continues to attend training as forecasted in the annual training plan. The ongoing training assessment and evaluation process continues to provide valuable information. The evaluation effort revealed that 75% of the individual training forecasted for FY 04 is complete or scheduled for completion by the end of the physical year. The ongoing organization re-engineering process within APCMG provides an opportunity to commit the remaining training budget. The re-engineering effort combined with other additional training, not previously forecasted, will bring this task to 100% completion by September 30, 2004 as projected.	75%	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>			
		8/9/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. FEBI is in the evaluation phase and upon award FEBI will be incorporated into the process.	90%	Green
		7/22/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. FEBI is in the evaluation phase and upon award FEBI will be incorporated into the process.	90%	Green

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48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			
		8/9/2004	The strategic acquisition planning and contract analysis tool (SAPCAP) database is almost complete and the redesign to SQL will enhance the databases ability to monitor contract expirations, contract types. The information extracted from the database in part will be used to monitor internal procurement control processes and produce reports for management analysis and decision making concerning key procurement issues. The database is schedule to be fully implemented by November 1, 2004.	92%	Green
		7/22/2004	No change from last report.	90%	Green
49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>			
		8/9/2004	Exceed FY 04 goals but still monitoring awards until the end of the FY. This task will carry over into the next FY as we continue to monitor contract dollars awarded to small businesses.	96%	Green
		7/22/2004	No change from last report.	95%	Green
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>			
		8/3/2004	IPC updates via the PMO scorecard are scheduled to resume Wednesday, August 11, 2004. IPC records have been reviewed and we believe that all projects/initiatives have been contacted regarding reporting into the PMO. July reports are due by 8/5. PMO staff can then ensure that all projects are reporting in.	80%	Green
		7/23/2004	The PMO continues to roll FSA projects under their oversight. Activites during this reporting period included confirming with CIO staff all business cases presented to the IPC over the last year. Upcoming activites to include meeting with remaining PMs that presented and received funds via the IPC, describing the PM function and introduce them to the monthly reporting format (scorecard). Weekly scorecard updates to the IPC will resume 8/11/04.	75%	Green
51	EPMS	<i>Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).</i>			
		8/3/2004	Per IPC meeting of July 28, this action item was approved to be cancelled.	08%	Cancelled
		7/23/2004	When this action item was developed, it was thought that the responsibilty for the SLC methodology would reside within the PMO (EPMS). That did not occur and subsequently, this became a part of the One Ed initiative under OCIO.	08%	Red
52	ADS	<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>			
		8/6/2004	The establishment of an integration team is necessary if FSA is to assume the integration support functions currently performed by our integration contractor, Grant Thornton. This new team has been proposed in the ASEDS reorganization package which has yet to be approved. After implementation of the reorganization, it will be necessary to hire staff and train the team to assume their new responsibilities. There is insufficient time available to fully accomplish this before 9/30/04. A new date for accomplishing this action item will be proposed after the ASEDS reorganization has been approved and authority for hiring staff has been granted.	70%	Red
		7/23/2004	Integration activites continue with the new contractor, Grant Thornton. Identifying the permanent group is part of the ASEDS org packet. It is anticipated that this will be completed prior to Spet 30.	70%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
53	EPMS		<p><i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i></p> <p>8/6/2004 General GAO's draft report on their high-risk review is due to us August 9 or 10, our comments will be due back August 23-25, and the final report will be issued September 10.</p> <p>Financial Management GAO requested FSA/CFO review a graphic they developed for their report on our cost model. Jay Hurt had commented on that in April, and resent those comments along with a proposed graphic that better depicts the resources, activities and outputs of FSA's model. GAO expressed appreciation for Jay's assistance.</p> <p>Systems Integration GAO requested FSA review a graphic they developed to depict our integration efforts. Katie Crowley reviewed it and sent GAO another graphic that depicts our systems integrations to date and planned. Mary Dorsey at GAO strongly expressed her appreciation for all the help Katie and others have given her as she struggled to learn our business and systems after joining the review in April.</p> <p>Program Integrity No questions from GAO in this area. We will probably have the opportunity to present some of CMO's recent efforts in our response to the draft report. We plan to keep GAO updated biweekly or monthly between now and December with good news in this area especially. We may want to brief GAO on our corrective action plan for the recommendations from OIG's review of CMO after that report is issued in final form.</p> <p>PBO Management GAO asked a follow up question on the Career Zone and Anne responded. They asked a question about the \$603m budget amount for fy2004 that was in the February presentation on reducing administrative costs that Mary Grace and Richard answered. They also asked again about the 2003 annual plan and senior managers' performance plans for that year. The 2003 plan we gave to GAO is the 18-item version (the 18 items that were funded) that was shared outside FSA. The senior managers' performance plans we gave to GAO had attached the 32-item version of the 2003 plan. Cyndi talked with Carolyn Taylor, Susan Higgins and Carla Craddock and explained the difference between the two plans.</p>	85% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status</i>	<i>Date</i>	<i>Comments</i>
			7/23/2004	<p>General</p> <p>GAO's draft report on their high-risk review is in their internal review process. We should expect to receive in the next two weeks.</p> <p>Financial Management</p> <p>GAO staff came in on 6/15/04 for a briefing by CFO Vicki Bateman on the ABC model and on FSA's improper payments calculation methodologies. FSA and contractor staff made presentations, answered questions and left GAO with takeaways to inform their report. Since then, we received one question about when the cost models would be considered operational, and we responded that they would probably be considered in a production mode in spring 2005, when the reporting capabilities are implemented.</p> <p>Systems Integration</p> <p>GAO had a few more follow up questions about the number of systems retired in integration, the functionalities of retired and new systems, and the currency of FEBI and CSB documents on the Web. Katie Crowley responded promptly. GAO has developed a graphic for their report to depict our integration efforts. We have offered to review that and verify the accuracy.</p> <p>Program Integrity</p> <p>After the exit conference, FSA sent GAO a number of documents related to the comprehensive compliance review process, including training materials. Kay Jacks and FSA staff met with OIG staff on 7/12/04 to discuss issues raised in OIG's draft report on CMO in which they express serious concerns about the effectiveness of our monitoring and oversight efforts. FSA must respond to the draft report's conclusions and recommendations very explicitly. We must explain exactly what we do currently to mitigate the limitations of IAM, exactly what our plan and timeline are for developing and implementing the policies and procedures we lack in this area, exactly what we will do to monitor adherence to the same, and how we plan to ensure the eCMO initiative does not repeat the shortcomings of the current and past systems and models.</p> <p>PBO Management</p> <p>GAO asked us to resend an email they had received in late March with responses to a number of questions on human capital issues. They had lost the original in a move. Calvin Thomas sent them the latest draft of our Human Capital Plan, as we promised at the exit conference.</p>
54	AWSS	Deliver workforce development and support programs.		
			8/7/2004	None.
56	CFO	Review Credit Reform estimates.		

%Complete *Status*

81% Green

90% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		8/6/2004	Budget Service, FSA, OCFO, and OPE presented the results of their FY04 collaborative efforts to auditors from Ernst & Young. Contracted technical experts met with representatives from each of the following groups of credit program managers in FSA: policy liaison and implementation; budgeting; loan origination; financial partners; direct loan servicing; loan consolidation; and, debt collection. The contractors began to draft an overview of ED's progress in addressing the credit reform reportable condition, and to make recommendations for FY05 improvements. Over the next several weeks, they will gather additional data as needed from program managers. We are confident that this project will be successfully completed by the end of the fiscal year.	59% Green
		7/29/2004	Project 56 was slow to start, in large part due to contracting issues, but is on track to be completed before the end of the fiscal year. Now that the legwork of calculating FY'04 credit subsidy estimates has been done and credit reform contract support is on board, we have begun to conduct an objective analysis of our business processes and estimation tools, and to identify opportunities for improvement. Those steps will intensify starting on Thursday, July 29th, as the team will meet with business owners to gather their requirements related to credit reform reporting.	47% Green
		7/23/2004	OCFO and FSA/CFO posted the FY04 credit reform estimation journal entries to the June 30 financial statements. Also, contracted technical experts have developed outlines of papers that they will prepare for ED. The papers will provide an overview of ED's progress in addressing the credit reform reportable condition, and will make recommendations for future improvements. Over the next several weeks, they will gather additional data as needed from appropriate program managers.	47% Green
58	CFO	<i>Support the implementation of Oracle Federal Financials Release 11i.</i>		
		8/6/2004	<ul style="list-style-type: none"> The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional sub-teams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users. Prepared a draft FSA Schedule 9/TROR position paper and distributed for review Assisted IBM in the identification and inventory of all FSA FMS customizations and extensions Assisted IBM in the formulation of a project-wide Change Management (CM) policy and process 	78% Green
		7/23/2004	<p>The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional subteams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users.</p> <p>Working to finalize the FSA-specific requirements for initial O11ie-wide requirements review by early August.</p> <p>Provided O11ie team with 11 Rational ReqPro licenses, facilitating a more structured approach to requirements management</p> <p>Prepared draft data flow diagrams regarding Credit Reform accounting and reporting options for both CSB and the FFEL program (GA and Lenders)</p> <p>Completed initial drafts of configuration matrices of the FSA FMS v11.03 configuration for each Oracle module.</p>	74% Green
59	CFO	<i>Implement automated budget funding entry solution.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		8/6/2004		FMS contractors continue to develop the code; the EDCAPS contractor has delivered the FMSS build to their system testers. The FMS and EDCAPS contractors finalized their test scripts. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all develop code and test in unison. The project continues on-schedule and on-budget.	71% Green
		7/23/2004		FMS and EDCAPS contractors are currently developing the code. The FMS contractor will finalize their test scripts this week and the EDCAPS contractor is also completing test scripts. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all develop code and test in unison. The project continues on-schedule and on-budget.	65% Green
61	CIO	<i>Implement Enterprise Data Strategy initiatives.</i>			
		7/23/2004		Overall project on schedule. Please see milestones for specific updates.	66% Green
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>			
		8/10/2004		Migration of the new CSB consolidation functionality has begun. Data conversion is progressing well. All five development releases of Phase 1 are in test.	80% Green
		7/26/2004		The success measure for item 62.2 of the annual plan is to begin migration of the legacy Loan Consolidation system into the CSB by July 2004. The CSB transition team has begun migrating the new CSB loan consolidation functionality into the CSB environment. All five development releases within Phase 1 are in test. However, schedule slippage has occurred with a new implementation date of October 2004 for Phase 1. The project status remains yellow.	80% Yellow
				Data conversion for all "in process" Loan Consolidation data, and for all Direct Loan Servicing demographic data is progressing well. Fewer data issues are being identified and those that are identified are being resolved.	
63	ADS	<i>Improve school partner oversight.</i>			
		8/6/2004		With the completion of milestones 63.1 and 63.6, this project is completed.	100 Completed
		7/23/2004		The IPC on 7/14/2004 approved the requested scope changes to milestones 63.1 and 63.6 and the cancellation of milestone 63.8. See the milestone updates for detailed information.	88% Green
67	ADS	<i>Prepare to implement IRS data match.</i>			
		8/6/2004		The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup is still scheduled to make its presentation to the Council on 8/11/04.	78% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/23/2004		The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup is scheduled to make its presentation to the Council on 8/11/04.	78% Green
				Jeanne Saunders and Dan Madzellan presented two IRS Match sessions at the NASFAA Conference in Minneapolis the week of July 19th, 2004. Session attendees participated in a discussion during the presentation and provided their thoughts and ideas for implementation.	
68	AWSS	<i>Continue Learning Coupon program.</i>			
		8/7/2004		None.	30% Yellow
		7/26/2004		As of 7/16 approximately 263 staff have used their coupon, which is 63% of our goal. \$114,505 has been obligated, which is 57% of our goal.	30% Yellow
69	AWSS	<i>Provide Career Zone services.</i>			
		8/7/2004		The Career Zone began July by introducing its second session of Conversational Spanish Experience; this class was full within hours of opening. Also enthusiastically received was the Brown Bag Video Presentation of "Who Moved My Cheese", which showed a 150% increase in attendance. The Career Counselors have now engaged over 50 new clients utilizing career counseling with an approval rate of 4.5; 3 of the new clients are from the visits to the New York and Philadelphia Regional visits in July. In August, the Denver, Seattle, San Francisco, Kansas City and Dallas regional offices will receive a Career Zone visit. The Career Zone is now able to offer an online version of Strong Interest Inventory Assessment to staff both at HQ and in the Regions. There is a strong interest in the regions for this assessment tool, and although it has not been advertised in HQ yet, we have already had staff to take the assessment due to persistent interest. An official campaign will be launched in August. With Career Zone Training and Career Zone Career Management running neck in neck at 4.8 and Counseling at 4.5, the Career Zone's evaluations come in a exciting approval rating of 4.71 on a 5 point scale.	75% Green
70	ADS	<i>Increase Student Financial Aid program awareness.</i>			
		8/6/2004		The two Milestones associated with this project (70.1 & 70.2) have been rolled into the Front End Business Integration (FEBI) small business initiative, now known as 'Federal Student Aid Integrated Enterprise Communications (FSAIEC)'. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. A request for quotes and an invitation to offerors has been sent to ten potential vendors. Past performance was received 8/2/04 and oral presentations are scheduled for 8/09/04 through 8/12/04. Task Order for Integrated Enterprise Communications Strategy and Implementation Plan to be released 8/16/04. This effort combines the vision of FSA communications group and Student Aid Awareness.	70% Green
		7/23/2004		The two Milestones associated with this project (70.1 & 70.2) have been rolled into the Front End Business Integration (FEBI) small business initiative, now known as 'Federal Student Aid Integrated Enterprise Communications (FSAIC)'. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. A request for quotes and an invitation to offerors has been sent to ten potential vendors. Past performance is due 8/2/04 and oral presentations are scheduled for 8/09/04 through 8/12/04.	55% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
71	ADS	<i>Reengineer EDEExpress.</i>			
		8/6/2004		The final task for Reengineering EDEExpress will be to test and post the Return to Title IV on the Web software.FSA Acceptance Testing is scheduled for the week of August 16th. The System of Records Notice (SORN) was posted in the Federal Register on July 23rd with a forty-day comment period. The anticipated completion of the clearance process is by late August. The PRR is tentatively planned for early September.	95% Yellow
		7/23/2004		FSA Acceptance Testing is scheduled for the week of August 16th. The PRR is tentatively planned for early September. The System of Records Notice (SORN) is awaiting sign off by management at OCIO, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August.	95% Yellow
73	CIO	<i>Develop FSA Security and Privacy Architecture Pilot.</i>			
		8/6/2004		Completed the Independent Govt Cost estimate and communicated it to the contracts. Currently in discussion with ILSC team about the scope of work for the Conceptual design SOO.	100 Completed
		7/30/2004		Completed the final SOO for Security Architecture Conceptual Design and have communicated it to ILSC. Awaiting a response from ILSC. Participating in discussions regarding IPM and Security Architecture Dependencies.	100 Completed
		7/27/2004		The success measures have been met for this reporting period (FY04) and this item is being closed accordingly. For this reporting period, we have identified leading candidates for identity and access management products based on the business drivers derived in data strategy. We have completed selected vendor product demonstrations for identify and access management enterprise tools. The task has also completed analysis of the products and provided results to FSA CIO and the Business units through BTIG presentations. The task also has briefed Security Officers on the tools and activities related to this security architecture initiative. The team had discussions with the CSB architecture and Security Team to ensure compatibility of the selected tools with CSB implementation and their requirements. The task has completed pilot implementation with ezAudit and X-sites at the VDC using the Tivoli set of products from IBM. Recent updates to this measure have been updates on additional work continuing around security architecture above and beyond those originally planned for in FY04. This work will be reported on in FY05 via a new performance measure. This is the last update that will be provided until then.	100 Completed
		7/23/2004		Continuing discussions with IPM and BTIG. Have given a draft SOO to ILSC vendor. Waiting for gaps and feedback. Currently working on a govt cost estimate.	100 Green
		7/16/2004		Met with the IPM and Enrollment access management teams to determine the touch points between Security Architecture and IPM. Presented te finding to the relevant business users. Modified the draft SOO for the conceptual design. The SOO is to be given to the ILSC contractor.	100 Green
74	AWSS	<i>Implement Leadership Excellence development training.</i>			
		8/7/2004		FSA is in the process of updating a Human Capital Plan that will focus on several areas, including leadership development. We will defer the adoption of a 360 assessment tool until FSA is further along with its leadership development curriculum and can determine how to integrate this kind of tool.	75% Yellow

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
	<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i>
		7/23/2004	<p>FSA is finalizing its updated Human Capital Plan which will provide direction for leadership development at FSA. The 360 assessment planned for FY04 will be built into managerial development activities to be built and delivered in FY05 and beyond.</p> <p>FSA is in the process of updating a Human Capital Plan that will focus on several areas, including leadership development. We will defer the adoption of a 360 assessment tool until FSA is further along with its leadership development curriculum and can determine how to integrate this kind of tool.</p>	75%
				Yellow

FSA Milestone Status Report

FSA No	Area	Action Item		Status Date	Comments	%Complete	Status
		Milestone#	Action Item				
1	ADS	Implement student aid awareness initiatives.					
		1.1	Leverage partnership activities to disseminate FSA information.				
		8/6/2004	SAA participated in 4 continuing partnership activities - July 21-24 collaborated with the White House Initiative on HBCUs to exhibit financial aid materials at the National Urban League Conference in Detroit, MI. July 25 – 28 distributed college preparation and financial aid information as well as a fact sheet describing how schools and school districts can join FSA's mailing list and order print publications at the National Indian School Board Association (NISBA) conference - participants included school board members, teachers, counselors, and administrative staff from Bureau of Indian Affairs schools and other schools with a high concentration of Native students. On July 28, presented a financial aid workshop to members of the GEAR-UP and college access community at the 2004 National Council for Community and Education Partnerships (NCCEP) annual conference in Washington, DC. July 28 participated in the U.S. Department of Labor's Youth Career Skills Challenge held at Catholic University in Washington, DC. - conducted three workshops on financial aid and exhibited materials during the college and career fair.			100%	Green
		7/23/2004	SAA participated in 3 continuing partnership activities - June 22 –24, partnered with Region 7 staff to exhibit materials at the 2004 SkillsUSA Conference. On July 14 & 15, participated in the Intel Computer Clubhouse Teen Summit in Boston, MA. Clubhouse students, parents and coordinators from around the world engaged in activities designed to focus their attention on college and career choices. The event, which was held at the Boston Museum of Science, provided attendees a variety of ways to explore college and career choices ranging from demonstrations on robotics to the opportunity to hold a snake. SAA contributed to the event by exhibiting financial aid materials and presenting information about Student Aid on the Web. The international students who are considering attending colleges in the U.S. were particularly impressed that they could use the Web site to research colleges in the U.S. and find out about requirements to study in the U.S. like "student visas." July 20, presented information on Student Aid on the Web and how to avoid scholarship scams at the First Federal Interagency American Indian/Alaska Native Intern Open House sponsored by USDA. The theme of the meeting was "Continuing the Generations into the Next Millennium."New partnership – July 7 –9, annual LULAC (League of Latin American Citizens) convention in San Antonio, TX. Exhibited materials and presented information on federal student aid programs and Student Aid on the Web.New activity - July 13-17, answered questions and distributed federal student aid information to teachers who convened for the annual American Federation of Teachers (AFT) Conference held in Washington, DC.			100%	Complete
		1.2	Publish accurate and timely information that meets the needs of our audience.				
		8/6/2004	GPO designer has provided two design choices for the Student Guide - program manager is pursuing a third choice. Designs may need revisions. Text of Guide still being revised. Usability study feedback reports show that student prefer an 'official' looking cover for FSA's information materials - which supports the credibility of the content. Usability study feedback is being incorporated into 2005-06 materials as development calendar permits. Draft of Counselor's Handbook completed. Work on Completing the FAFSA has begun.			19 %	Green

Status Date	Comments	%Complete	Status																					
7/23/2004	Designer chosen from GPO for Guide. Update given to GPO based on comments from usability re cover design. GPO designer to provide 3 mockups and will proceed according to updated info. Text of Guide is being revised.	18 %	Green																					
ate information directly to target audience.																								
8/6/2004	<p>Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 8/4/04, SAA has provided federal student aid information and distributed materials to approximately 80,689 persons as follows:</p> <table><tr><td>July 24-29, 2004</td><td>National Indian School Board</td><td>200</td></tr><tr><td>July 25-28, 2004</td><td>NCCEP/GEAR-UP</td><td>60</td></tr><tr><td>July 28, 2004</td><td>DOL Youth Career Skills Challenge</td><td>150</td></tr></table> <p>During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.</p>	July 24-29, 2004	National Indian School Board	200	July 25-28, 2004	NCCEP/GEAR-UP	60	July 28, 2004	DOL Youth Career Skills Challenge	150	80 %	Green												
July 24-29, 2004	National Indian School Board	200																						
July 25-28, 2004	NCCEP/GEAR-UP	60																						
July 28, 2004	DOL Youth Career Skills Challenge	150																						
7/23/2004	<p>Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 7/23/04, SAA has provided federal student aid information and distributed materials to approximately 80,279 persons as follows:</p> <table><tr><td>June 22-24, 2004</td><td>USA Skill Conference</td><td>700</td></tr><tr><td>June 26-29, 2004</td><td>National PTA</td><td>750</td></tr><tr><td>June 29-July 6, 2004</td><td>National Federation of the Blind</td><td>400</td></tr><tr><td>July 6-9, 2004</td><td>League of United Latin American Citizens</td><td>750</td></tr><tr><td>July 13-15, 2004</td><td>American Federation of Teachers</td><td>200</td></tr><tr><td>July 14-15, 2004</td><td>Intel Computer Clubhouses</td><td>200</td></tr><tr><td>July 20, 2004</td><td>USDA Intern Program</td><td>60</td></tr></table> <p>During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.</p>	June 22-24, 2004	USA Skill Conference	700	June 26-29, 2004	National PTA	750	June 29-July 6, 2004	National Federation of the Blind	400	July 6-9, 2004	League of United Latin American Citizens	750	July 13-15, 2004	American Federation of Teachers	200	July 14-15, 2004	Intel Computer Clubhouses	200	July 20, 2004	USDA Intern Program	60	75 %	Green
June 22-24, 2004	USA Skill Conference	700																						
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July 14-15, 2004	Intel Computer Clubhouses	200																						
July 20, 2004	USDA Intern Program	60																						
accurately and timely to requests.																								
8/6/2004	<p>For the period 7/5/04 –7/16/04, the Editorial Services Contract responded to the following correspondence:</p> <p>104 controls--- (97 prior period)-----turnaround (3 days)=100% 1205 non-controls--- (1117 prior period) —turnaround (2 days)=100% 2376 e-mails--- (2008 prior period)-----turnaround (2 days)=100%</p>	99 %	Green																					
7/23/2004	<p>For the period 7/5/04 –7/16/04, the Editorial Services Contract responded to the following correspondence:</p> <p>97 controls--- (72 prior period)-----turnaround (3 days)=83% 1117 non-controls--- (1226 prior period) —turnaround (2 days)=100% 2008 e-mails--- (2200 prior period)-----turnaround (2 days)=100%</p>	99 %	Green																					

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
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		1.5	Reach customers through Student Aid on the Web.					
		8/6/2004	Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (07-18- to 07-31-04) are 856,715 and 16,252,118 respectively. During the same period last fiscal year we had 658,259 visits and 10,540,949 hits. This represents FY04 increases of 30.1% for visits and 54.2% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 42,954 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.				100%	Complete
		7/23/2004	Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (07-04- to 07-17-04) are 747,127 and 12,976,215 respectively. During the same period last fiscal year we had 602,749 visits and 9,471,779 hits. This represents FY04 increases of 23.9% for visits and 37% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 40,918 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.				100%	Complete
<hr/>								
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).						
		2.1	Monitor customer feedback to improve services.					
		8/6/2004	Progress continues as follows: Replacement of IFAP and School Portal Search Engine -- Google servers arrived this week, so they are approximately on schedule. ITA plans to migrate FSANet first, then IFAP, which might happen in September. It's possible this new hardware and software may not be totally transitioned until the next fiscal year, but certainly by the end of the 2004 calendar year.				85 %	Green
		7/23/2004	Progress continues as follows: Lotus Notes Enhancement - As a result of continuing meetings with EZ Audit staff, a recommendation was made to enhance our Lotus Notes software. The software was revised since our last reporting period so that when a reminder email was sent to an employee regarding an overdue inquiry, the email will include the name, phone number, email address (if available) and the incoming question. This will help the employee remember what the particular case was about without having to go into the Lotus Notes system. Customer Feedback - We reported (last time) about a suggestion that came in from Bill Zahn of University of NC-Greensboro for an improvement to the email notices that go to students who submit their FAFSAs on the web. The suggestion was forwarded to the Application Processing Division. They accepted the suggestion and will implement a change for the upcoming 2005-06 processing cycle. This improvement will make it clearer to the student that he/she must look at his/her FAFSA data to ensure that it was processed properly and to avoid missed deadlines.				81 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			<i>%Complete</i>	<i>Status</i>	
		<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>		
6	ADS	Administer Campus-Based (eCB) activities.					
		6.5	Issue FISAP software release.				
				7/23/2004	The FISAP software was posted to the e-CB web site on 7/18/2004. The milestone has been completed.	100%	Complete
8	ADS	Expand eZAudit initiative.					
		8.1	Be Prepared for Contract Award.				
				8/6/2004	Task order awarded July 30.	80 %	Green
				7/23/2004	Market research interviews begin 7-22 through 7-28.	75 %	Green
					SOW went to Accenture. Proposal due back this week. Award of Task Order within 2 weeks.		
		8.2	Complete first full cycle of processing (all school types).				
				8/6/2004	As of 8-1, 4,502 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed the milestone, but will continue to report on volume of submissions rec'ed through the end of the year.	85 %	Green
				7/23/2004	As of 7-18, 4,267 annual audit submissions have been rec'd. 1,743 submissions have passed the QC screening. We will monitor this workload to assure timely processing.	78 %	Yellow
		8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.				
				8/6/2004	As of 8-1-04, 4,495 schools have registered, 90% of all schools.	90 %	Green
				7/23/2004	As of 7-18-04, 3,186 schools have registered, about 73% of all schools.	73 %	Green
9	ADS	Enhance program monitoring and oversight.					
		9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year.				

Status Date	Comments	%Complete	Status
8/6/2004	For the biweekly period 7-19-04 to 8-1-04, 99% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.	80 %	Green
7/23/2004	For the biweekly period 7-5-04 to 7-18-04, 96% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.	75 %	Green
9.2	Continue to measure school monitoring to assess overall compliance trends.		
8/6/2004	The dry run training for the FY 2004 Compliance Initiative was conducted on 7-27 & 28. SEC briefed Management Council on 8-2-04. Next steps include briefing OPE and OGC on 8-12.	80 %	Green
7/23/2004	For the first 3 qtrs of FY 04, SEC conducted a comprehensive review of 1,990 unduplicated schools, or 32% of the total population, covering 37% of Title IV funding. An add'l 152 schools received an on-site program review and 84 schools received an on-site technical assistance visit. On 7-14, Fin Partners decided to initiate certain changes at the NSLDS that will provide simplified options for transfer student monitoring for institutions with additional locations. Therefore, we are delaying further contact with institutions that do not yet have transfer student monitoring profiles for one or more of their additional locations. We are continuing to contact institutions where the main campus only has not yet established their profile. More info on school options for locations to be forthcoming in another week. Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 41%. The number of schools and locations without required profiles is down from 2,356 on 3/17/2004 to only 1,319 on 7/13/2004.	72 %	Green
9.3	Conduct School Relations initiatives.		
8/6/2004	Data is being studied by Campus Based Operations for the HBCU Perkins default project. We will explore a course of action based on this analysis.	90 %	Green
7/23/2004	Under guidance from the original findings, the HBCU Perkins default database now reflects data from all of the HBCU schools and is in the process of including their Cohort Default rates. It is planned to be finished in the coming week.	88 %	Green
9.4	Conduct the Experimental Sites initiative.		
8/6/2004	Work continues, but no significant change in status. CIO has agreed to fund the updates to the reporting mechanism for the next cycle of data submission and analysis and preliminary discussions have taken place, to be followed by planning meetings.	90 %	Green

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
					7/23/2004	Work continues, but no significant change in status. ASEDs is working with CIO to fund the updates to the reporting mechanism for the next cycle of data submission and analysis.	90 %	Green
		9.5	Administer the Quality Assurance program.					
					8/6/2004	In addition to providing Guidelines for using Phase I of the ISIR Analysis Tool, training sessions using WebEx technology began the week of July 26, 2004. We conducted 11 as of August 4, with 6 more scheduled between August 6 – 13, 2004. We completed the review and made the enhancements to all 22 FSA Assessment modules.	95 %	Green
					7/23/2004	Work continues, but no significant change in status. The dry run of WebEx training on Phase I of the ISIR Analysis Tool took place on July 12 and the training sessions are scheduled to begin the week of July 26, 2004 and conclude by mid-August 2004.	88 %	Green
		9.6	Conduct vulnerability assessment.					
					8/6/2004	Work this reporting period included a status briefing to the ASEDs management council and additional interviews and working meetings with subject matter experts. Work to identify vulnerabilities and potential mitigation strategies associated with student identification and authentication continues. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.	50 %	Green
					7/23/2004	Work this reporting period focused on internal controls and vulnerabilities in monitoring schools that deliver Title IV aid. During the next reporting period, work will include more focus on identifying vulnerabilities around student identification and authentication. The work for this milestone continues on track for completion by the 9/30/2004 end date. As noted in earlier updates, the work on this milestone did not begin in earnest until May 2004. At that time, an 8-step approach over a 4-month period was developed. Currently, we have completed half of the steps according to schedule. Work will continue to complete the remaining steps in August and September.	40 %	Green
10	ADS	Produce school publications and materials.						
		10.1	Annually update and disseminate the Federal Student Aid Handbook.					
					8/6/2004	Completion date for FSA Handbook Revised date: September 30, 2004 This year we revised the Handbook to be more meaningful to our schools. This shifted information and so it is taking more time than usual to go through the review process. The review of several volumes of the FSA Handbook is still underway, and has already taken much longer than for previous versions of the FSA Handbook. Volumes 3 and 4 of the Handbook were circulated for review in early February and early March, respectively. However, a new review process is now in place, and we are waiting for the Office of Postsecondary Education to provide comments.	70 %	Red

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
					7/23/2004	There has been no development in this project again this week. This project may need Terri's help to get through the POC review process.	70 %	Red
		10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.					
					8/6/2004	The PLUS Basics brochure is being reviewed by OPA. The students brochure is out for review and comment. Currently, there are 73 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure (with a small amount for the student brochure). As previously noted, schools have been informed that we are revising these brochures.	85 %	Green
					7/23/2004	The PLUS Basics brochure is designed and was reviewed by management and the Direct Loan Coalition last week. Final edits will be completed this week and the document will be submitted to OPA. Once approved, it will be submitted for printing. The students brochure will be finalized shortly after the PLUS is complete. Currently, there are 57 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure.	81 %	Green
13	BS	Enhance program monitoring and oversight.						
		13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.					
					8/10/2004	Total non-consolidation recoveries have now reached \$1.361 Billion, an increase of 24 percent from the same period, thru July 30th, in FY03. This represents 8.55 per cent of the FY04 portfolio balance.	90 %	Green
					7/23/2004	Total non-consolidation recoveries reached \$1.321 Billion, an increase of 24 percent from the same period, thru July 16, 2004, in FY03. This represents 8.30 per cent of the FY04 portfolio balance.	80 %	Green
		13.2	Update FSA-wide risk management and default prevention inventory.					
					8/10/2004	The Default Prevention Workgroup met on July 30 and reached agreement on strategies, strategy owners, and the tracking of initiatives. A new strategy for Fraud Prevention was established and will include verification processes for FASFA and Conditional Disability claims. A notebook was created on a shared drive to permit strategies and action steps to be updated as needed and to provide an electronic notebook for outside entities (i.e. GAO) to review FSA efforts to reduce the high-risk status.	95 %	Green
					7/23/2004	The Default Prevention Workgroup will meet July 30 to reach a final agreement on strategies and the tracking of initiatives. The team has divided the initiatives into two categories: "established production" and "tried and not implemented into production".	85 %	Green
		13.3	Complete the work on the implementation of the life-time default rate measure.					

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			8/10/2004	The Portfolio Risk Management Group has extracted data from the NSLDS for FFEL loans for cohort years 1994-1998. The information is being placed in review format.	90 % Green
			7/23/2004	The Risk Management Group will continue to extract information from the NSLDS for FFEL loans for cohort years 1994-1998. Direct Loan calculations, based on the year of origination, are complete for consolidated and non-consolidated loans for 1994-1998.	85 % Green
		13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.		
			8/10/2004	The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-August.	80 % Green
			7/23/2004	The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-August.	80 % Green
		13.5	Conduct vulnerability assessment.		
			8/10/2004	The Independent Verification and Validation (IV&V) team has delivered the plan for review of the CSB project. The major areas that will be reviewed and monitored are Requirement Management Process, Risk Management, Change Management, Test Process, Security Risk Assessment and Certification and Accreditation Support, Review Financial Controls, Production Readiness Review recommendations, and Maintainability Assessments. Each of these areas will be reported on the FY05 performance plan.	100% Green
			7/23/2004	The independent Verification and Validation (IV&V) team is continuing to review the functional requirements, detailed designs, and test plan.	80 % Green
16	FPS	Perform National Student Loan Data System (NSLDS) maintenance and operations activities.			
		16.1	Perform cohort default rate calculations, send, and post.		
			8/6/2004	The official cohort default rate calculation ran successfully on Saturday, 7.31.2004. Data files were transferred to PEPS. QA/QC review is now in process. NSLDS will send Cohort Default Rate packages electronically to schools via SAIG on Monday, 9.13.2004.	80 % Green
			7/23/2004	The next rate calculation is scheduled for Saturday, 7.31.2004 for the official cohort default rates. NSLDS participated in the Default Rate Coordination meeting held on Wednesday, 7.7.2004.	51 % Green
		16.2	Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.		

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		8/6/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.		75 %	Green
		7/23/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.		75 %	Green
16.3		Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.				
		8/6/2004	The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%.		76 %	Green
		7/23/2004	The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%.		76 %	Green
16.6		Provide monitoring functionality of GA and lender reasonability on a monthly basis.				
		8/6/2004	Final detail design requirements have been approved by the department. Programming for GA monthly reasonability has begun. Lender analysis crosswalk has been drafted.		70 %	Green
		7/23/2004	Review of the draft detail design from the previous contractor was completed. Lender reasonability matrix is under construction. A meeting was held to review possible edit changes. Meetings were held on Data Strategy and Oracle 11i to determine the use of the data from this task order.		59 %	Green
19	FPS	Perform maintenance and operations activities for the Financial Partners Data Mart.				
		19.1	Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.			
		8/6/2004	The team completed the analysis of the current reports - all reports are valid at this time.		94 %	Green
		7/23/2004	The team is reviewing several reports to determine if some of these reports are still valid.		88 %	Green
		19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes.			
		8/6/2004	The deficiency code record has been loaded to the FP Data Mart. Monthly Report submitted.		92 %	Green
		7/23/2004	The deficiency code was a keying error; this record will be resubmitted with the next data mart load.		87 %	Green

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		19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.			
		8/6/2004	No Changes to this activity this reporting Period.	91 %	Green	
		7/23/2004	FMS Ops timeframe to complete enhancement of the process to create a CR to send only a unique record each month is Tuesday, 8.31.2004.	91 %	Green	
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>				
		20.1	Monitor and evaluate web page hits to drive future postings to portal.			
		8/6/2004	The Guaranty Agency Financial Report ED FORM 2000 Interim Instruction Guide was posted. Monthly report submitted.	98 %	Green	
		7/23/2004	The following items were posted on the FP Portal: FFELP Special Allowance Rates, Current Treasury Bill and Commercial Paper Rates. A Lenders/Servicers satisfaction survey notice was also posted.	96 %	Green	
		20.2	Maintain current and relevant information to financial partners' user community.			
		8/6/2004	The What's New template was deployed on Sunday, 8.1.2004. Monthly Report submitted.	96 %	Green	
		7/23/2004	The contractor redesigned the What's New template to eliminate the page limitation.	92 %	Green	
		20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.			
		8/6/2004	Completed.	100%	Complete	
		7/23/2004	All suggestions and enhancements submitted by the user community have been implemented to the FP Portal. This action item is now completed.	100%	Green	
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>				
		22.2	Prepare performance measure assessment and benchmarking reports.			

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				8/6/2004	Progress on this milestone has been impacted by the additional data requests from Ernst & Young in support of maintaining our clean audit opinion. Working to address the impacts so that a test report can be published by 9.5.2004.	96 %	Green
				7/23/2004	FPS is responding to questions/comments associated with the DRAFT report that was forwarded for comments on Friday, 7.9.2004. The DRAFT report is modeled after the existing FSA Benchmark report and it is being modified to more clearly represent the data.	96 %	Green
		22.3	Evaluate new applications for VFA.				
				8/6/2004	Benchmark process is complete and the report will be published beginning 10.1.2004 using the results from Colorado and the in process applications for Missouri, USAF, and Nebraska/South Dakota.	100%	Green
				7/23/2004	FPS is responding to questions/comments associated with the DRAFT process document that was forwarded for comments. Initial timeframes for completing the process steps have not been achieved for the NSLP/EAC VFA request or the USAF request. The timeframes are based on having a dedicated FTE assigned to completing the tasks and that is not the current environment due to conflicting priorities. To address this situation, tasks are being shifted from the DC to Regional staff.	99 %	Green
		22.4	Foster effective working relations with guaranty agencies during scheduled site visits.				
				8/6/2004	Out-reach efforts to continue development of effective working relationships for this period included conference call with CSAC/EdFund Executive Management to discuss ways to modify the existing VFA agreement to bring it back into cost neutrality, continued negotiations with NSLP/EAC regarding their VFA proposal, and discussions with USAF to explain the need for stability in the SLMA Guarantor Servicing system before VFA approval.	86 %	Green
				7/23/2004	FPS met with CSAC/EdFund in a "face to face" meeting on Wednesday, 7.14.2004, to inform them that the existing VFA agreement was not cost neutral. FPS and CSAC/EdFund will be working in the coming weeks to restructure the agreement to achieve cost neutrality and to re-align it with the current direction being set for new VFA's.	82 %	Green
25	FPS	Enhance program monitoring and oversight.					
		25.1	Participate and provide Financial Partners Channel support for ED audit.				
				8/6/2004	An additional request has been made of fifteen GAs to provide Trial Balances from their financial records. Financial Partners has received the additional three months (April through June 2004) of subrogated and Federal Receivables from the five GAs. Reconciliations have been completed by the Accounting Division between DCMS and Form 2000 download subrogations for the five GAs. FP will continue to coordinate and monitor E&Y's requests.	86 %	Green

		7/23/2004	The GAs are in the process of complying with E&Y's request to send in an additional three months (April through June 2004) of subrogated and receivable download data. In addition, E&Y has requested copies of GA financial statements as well as Federal Fund balances as of June 30. E&Y is also planning on sending demographic confirmations letters to the GAs. FP will continue to coordinate and monitor E&Y's requests.	85 %	Green
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers. Use results to determine technical assistance, future monitoring and oversight needs. Coordinate the interpretation of the code of Federal regulations with all elements of the Department of Education that include legal, policy, CFO, general managers and COO in performing our reviews and assessing liabilities.				
		8/6/2004	During this reporting period the review teams completed the first week of a two-week review of the Iowa and New Hampshire guaranty agencies. A revised Compilation of Servicer Review Findings and Observations was issued. Copy submitted.	83 %	Green
		7/23/2004	During this reporting period the review team completed the second week of a two-week review at the Nebraska guaranty agency. Completed reviews of the following 3 servicers; Wyoming Student Loan Corporation, Educational Assistance Service Comp. and Bank of North Dakota.	70 %	Green
25.3	Analyze and collect third-party audit findings. Use results to determine technical assistance, future monitoring and oversight needs. Utilize PEPS to integrate findings.				
		8/6/2004	Completed.	100%	Complete
		7/23/2004	Completed summary report of findings for FY03 period. The guaranty agency audit findings were non-monetary (i.e. inaccurate reporting to NSLDS by GA) and Abbreviated Resolution Letters were issued to the applicable agencies. The lender audit findings were also non-monetary and many were the result of the findings/issues identified by Sallie Mae (i.e. Error in calculation of payment amounts).	100%	Green
25.4	Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.				
		8/6/2004	Completed.	100%	Complete
		7/23/2004	The lender review schedule for FY05 has incorporated, where feasible, the lender scorecard and identified specific lender scores. As these reviews are conducted in FY05, the results of the review findings will be analyzed with scorecard detail to determine validity of the process. The GA and Lender scorecard have been integrated into the FY05 review process. While still an experimental tool the scorecards value should increase as reviews are conducted and determination is made as to what metrics work well and what other items should be added or deleted. This project is considered finished for FY04.	100%	Green
25.6	Conduct vulnerability assessment.				
		8/6/2004	Work continues on this project. Contractor is following NIST procedures and completing NIST survey. NOTE: This milestone did not commence until Monday, 6.28.2004. Work is currently at midpoint and continues to be on track for completion no later than Thursday, 9.30.2004.	50 %	Green

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
					7/23/2004	Work on this task order began on Monday, 6.28.2004. The contractor will conduct the study within NIST standards. It should be noted that even though this action item commenced with a late start date, we are confident the contractor will complete this effort no later than Thursday, 9.30.2004.	40 %	Green
47	EPMS	Implement enterprise contract performance monitoring measures against new systems contract awards.						
		47.2	Incorporation of FEBI into process by September 30, 2004.					
				8/9/2004	The FEBI contract will not be awarded until 30 September 2004 or beyond. Consequently, it will not be possible to implement standard contract performance management for this program in FY04. The Target Date for this milestone must be changed to September 2005.		90 %	Green
				7/22/2004	This is a continuous requirement and will carry over until the next FY.		80 %	Green
48	EPMS	Continuously update and monitor procurement internal controls.						
		48.2	Establish reporting process to monitor vendor performance.					
				8/9/2004	The process improvement will continue through FY05. The strategic acquisition planning and contract analysis tool (SAPCAP) database will include data fields for entering data related to vendor performance. The revised COR designation letter under development, combined with the ongoing COR training and certification evaluation, followed by implementing a program to train, re-train, certify or re-certify COR's will enhance FSA's methodology and processes for monitoring vendor performance monitoring.		85 %	Green
				7/22/2004	No change from last report.		80 %	Green
54	AWSS	Deliver workforce development and support programs.						
		54.1	Continue Intern Program.					
				8/7/2004	The interns are leaving this Friday. We had our intern fair on Monday the 2nd and it was a huge success. I'm still gathering the survey results from them. I've heard nothing but wonderful things from the managers about our interns and their work. We're very fortunate to have this group in FSA.		96 %	Green
				7/23/2004	We had our FSA Traditions Training for FSA Interns on Friday 7/16/04. Terri made an appearance which was great. At the end of the training, we solicited feedback from the interns on our program and have sent them a survey to capture some of the things they've learned about FSA over the summer. We're going to move the Intern Fair back a week to 8/2 or 8/3 so Terri can come to it.		90 %	Green

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		54.2	Conduct FSA Orientation.			
			8/7/2004	The next FSA New Employee Orientation Program (NEOP) is scheduled for September 1, 2004. All new employees and employees that were scheduled for prior sessions, but were unable to attend have been notified to attend this session. All supervisors for these employees have been notified. The "Dry Run " for the presenters for the FSA NEOP is scheduled for August 18, 2004.	90 %	Green
			7/20/2004	Revisions are being made to the draft of the new FSA video. The FSA NEOP web site design team developed a draft template for the FSA NEOP web site. The information to be placed on the web site is being reviewed. Notices to all FSA new employees who were unable to attend the previous FSA New Employee Orientation Program sessions have been notified to attend the September 1, 2004 session.	90 %	Green
		54.3	Implement results of One-ED Competitions.			
			8/7/2004	None.	25 %	Yellow
			7/23/2004	Nothing new to report.	25 %	Yellow
		54.4	Update Skills Catalog/Learning Tracks.			
			8/7/2004	Additional proofreading/refining is currently ongoing and being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit. A meeting is being held on August 11 for a final internal review and it is planned that the draft will be sent to external proofreaders the week of August 16.	94 %	Green
			7/23/2004	FSA U and ASEDS staff are meeting with TDC representatives July 26 to discuss developing a learning track for institutional reviewers. Additional proofreading/refining is currently ongoing and being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit. A meeting is being held on July 22 to discuss and plan the online version of the catalog.	92 %	Green
		54.5	Implement Workforce Alignment Strategy.			
			8/7/2004	None.	94 %	Yellow
			7/23/2004	Negotiations with the union are ongoing. OPM has submitted our request into clearance and approval is expected between 7/22 and 7/27. We have meet with OM to begin our planning for implementation.	94 %	Yellow
		54.6	Update the FSA Human Capital Plan - reflecting the mission-critical challenges, workforce needs and plans for recruiting, retaining, developing and motivating staff.			

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				8/7/2004	The Management Council is conducting a retreat August 4-6 to focus on the updated FSA Human Capital Plan. Among the issues to be discussed are the creation of an FSA Human Capital calendar; items to include on a dashboard of Human Capital metrics; and an FSA approach to succession planning.	85 %	Green
61	CIO	Implement Enterprise Data Strategy initiatives.					
		61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management and Oversight (eCMO), National Student Loan Data System (NSLDS), and electronic Campus-based systems.				
				8/6/2004	Conducted working sessions during the week of July 26th for the Campus-Based, NSLDS, FP and Case Oversight, and AR functional gap areas for deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis Final.	69 %	Yellow
				7/30/2004	Held kickoff/working group meetings during the week of July 21st for Campus-Based, FP Oversight, and NSLDS functional gap areas.	66 %	Green
				7/23/2004	Received approval to begin work on the Campus-Based and Case Oversight functional gap areas of deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis (Final).	66 %	Green
				7/16/2004	Held a NSLDS Functional Gap Analysis meeting on Wednesday, July 14th to discuss NSLDS current state functions.	66 %	Green
		61.9	Develop the detail Data Quality Execution Plan.				
				8/6/2004	Held a Data Quality Steering Committee meeting on Thursday, July 29th, to conduct a further analysis on data quality issues using the Assessment business templates.	69 %	Yellow
				7/30/2004	Held a Data Quality Steering Committee meeting on Thursday, July 22nd, to conduct an analysis on data quality issues using the Assessment business templates.	66 %	Green
				7/23/2004	No Change.	66 %	Green
				7/16/2004	Held a Data Quality Steering Committee meeting on Wednesday, July14th to review the Assessment Phase of the Data Quality Implementation Methodology.	66 %	Green
		61.10	Develop a holistic XML Management Plan.				
				8/6/2004	Deliverable 152.1.9a XML Registry/Repository Production Quarterly Report I is on schedule for delivery on Friday, August 13th.	64 %	Yellow

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				7/30/2004	Continued supporting the XML Registry/Repository in production.	61 %	Green
				7/23/2004	Cancelled Deliverables 152.2.1 Electronic Data Exchange Application Processing and Correction Record XML Schema Analysis, 152.2.2 Electronic Data Exchange Application Processing and Correction Record XML Schema Modeling, and 123.1.20 XML ISIR Technical Reference Support.	61 %	Green
				7/16/2004	No Change.	61 %	Green
		61.11	Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.				
				8/6/2004	In the next couple of months: Finalize analysis of the effectiveness of current SSIM algorithms for correction sources. Begin to modify the SSIM algorithms to implement findings, and provide possible solutions to exception conditions. Additionally, begin to analyze the change notification process, with emphasis on the volume of notifications that will be generated, and automation necessary to maintain current functionality.	80 %	Green
62	BS	Begin the implementation of Common Services for Borrowers (CSB).					
		62.2	Begin implementing Phase 1 of the FSA-approved transition plan.				
				8/10/2004	Migration of the new CSB consolidation functionality has begun. Data conversion is progressing well. All five of the development releases of Phase 1 are in test.	85 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
			<i>Milestone#</i>	<i>Action Item</i>	
			<i>Status Date</i>	<i>Comments</i>	<i>%Complete Status</i>
			7/26/2004	<p>Contracts - ED continues to accrue savings from the CSB deliverable pricing. Identifying and resolving small balance accounts and closing those accounts has resulted in additional reductions in costs. The reduction comes from CSB maintaining fewer billable units (borrower accounts).</p> <p>Development - Phase 1 is comprised of 5 separate releases with a single implementation. All five releases are in various stages of testing. The schedule for the testing is being monitored closely. Phase 2 development activities are just beginning with initial Joint Applications Development (JAD) meetings being scheduled for early August.</p> <p>Infrastructure - All data communications circuits and routers have been installed. This has allowed document image storage (Promissory notes, deferments, discharge requests, etc.) to be moved to a facility in Dallas Texas.</p> <p>Operations - Operations continues via the legacy systems. Many operational changes have occurred independent of, but coordinated with the full CSB implementation. Examples of these changes include "Warm transfer" capabilities between all of the CSB call centers implementation of early delinquency prevention, Spanish language Loan Consolidation web site, new telecommunications infrastructure, etc.</p> <p>Oversight - IV&V is reviewing all Detailed Design Documents and will produce a "Requirements Traceability Summary". ACS IQCU and the IV&V are being asked to consider "joint" In Process Reviews (IPRs) and "joint" periodic Readiness Assessments. Separate Production Readiness Reviews would be maintained.</p> <p>IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is continuing to review the functional requirements, detailed designs, and test plan. The risks that are listed in this report will be monitored in FY2005 with measures for success included.</p>	80 % Yellow
63	ADS	Improve school partner oversight.			
		63.1	Procure a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).		
			8/6/2004	As reflected under milestone 63.6, the contract was awarded to ILSC (Grant Thornton) on 7/23/2004. Milestone completed.	100% Complete
			7/23/2004	The scope change for this milestone was approved by the IPC on 7/14/2004 in conjunction with the scope change for milestone 63.6. See milestone 63.6 for details on the current status.	88 % Green
		63.6	Select competitively a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).		
			8/6/2004	The contract was awarded to ILSC (Grant Thornton) on 7/23/2004. Milestone completed.	100% Complete
			7/23/2004	The IPC on 7/14/2004 approved the scope change for this milestone as requested.	88 % Green
				The proposal from the ILSC (Grant Thornton) was received and approved. We are waiting for the contracting officer to award.	
		63.8	Procure the design of a workflow tool for SEC.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>				
		<i>Milestone#</i>	<i>Action Item</i>			
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>	
		7/23/2004	As approved by the IPC on 7/14/2004, this milestone has been cancelled due to the fact that it is premature to procure a workflow tool for SEC. As previously noted, there is nothing additional to be done on workflow other than the IPMS high-level (conceptual) design. Sequencing Plan will determine the order of solution components.	73 %	Cancelled	
70	ADS	<i>Increase Student Financial Aid program awareness.</i>				
		70.1	Expand federal student aid awareness and outreach program.			
		8/6/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	100%	Complete	
		7/23/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	80 %	Green	
		70.2	Develop and implement long-term mass marketing strategy.			
		8/6/2004	Procurement on schedule. Oral presentations due week of 8/9/04. Task Order to be release 8/16/04.	70 %	Green	
		7/23/2004	ASEDS Management Council briefed. Draft Task Order complete.	50 %	Green	
71	ADS	<i>Reengineer EDEExpress.</i>				
		71.3	Implement Return to Title IV Web Release.			
		8/6/2004	The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th. A testing team has been put together and the PRR is tentatively scheduled for early September. The System of Records Notice (SORN) has been published in the Federal Register on July 23, 2004 and the 40-day comment period has begun.	95 %	Yellow	
		7/23/2004	The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th. A testing team has been put together and the PRR is tentatively scheduled for early September. The System of Records Notice (SORN) is awaiting sign off by management at the OCIO, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August.	95 %	Yellow	